

Visit Report: Send internally

Overview

In this section, you will find information about how to send a visit report internally, to Solvay contacts, through Salesforce.

Concerned profiles:

All except Strategic Marketing

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Step By Step

Share a Visit Report

1

David has the 2 possibilities for sharing a visit report with participants:

Send Report to Customer

- David can send the Visit Report to the Customer. It will take the information entered in the field **Visit Report** and send the VR to:
 - To: Customer Contact(s)
 - CC: Solvay Contact(s)

Send Report Internally

- David can send the Visit Report internally. It will take the information entered in the field **Executive Summary and Additional Information** and send the VR to:
 - To: Solvay Contact(s)

•David decides to share the Visit Report in the both ways.

Share a Visit Report internally

1

David wants now to share the VR with internal colleagues

2

He opens the visit report he wants to share

Visit Report Customize Page | Edit Layout | Printable View | Help for this Page

New Product Presentation

Show Feed

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Visit Report Detail Edit | Delete | Clone | Sharing | Send Report to Customer | Send Report Internally | Report Wizard

▼ Information

Owner	Arnaud Denewet Change	Account	BAYER CROPSCIENCE
Subject	New Product Presentation	Opportunity	
Date of the Visit	03/03/2016	Contact	Thomas O'Malley
GBU	Perioxides	Activity	View Activity
BU	BU	Account Plan	
Visibility	Shared	Case	
Visit Report Status	Drafted	WEGO ID	WEGO ID

▼ Internal Report

Executive Summary [Visit has been very positive. Interest in our product and first contact taken for potential opp.](#)

Objectives Of The Visit

Additional Notes

End Use [SOLVENT FOR FORMULATION OF UREASE INHIBITOR](#)

Safety Visit ☐

▼ Visit Report (Shared with Customer)

Visit Report [Following points discussed:](#)

- Product Solvent X32: interest and need to have more documentation
- Current contract prolongation: to be discussed later

3

He clicks on the button Send Report internally

Visit Report Customize Page | Edit Layout | Printable View | Help for this Page

New Product Presentation

Show Feed

Back to List: [Contacts](#)

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▼ Internal Report

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David can now edit the information before definitely send the VR to the customer

Visit Report Preview

To: arnaud.denevet@accenture.com; christian.cano-ex@solway.com

From: arnaud.denevet@accenture.com

CC:

Select Template: Visit Report in English

Select Attachment	File Name
☒	Product Information.png

Subject: BAYER CROPSCIENCE - Visit Report - 2016-03-03 - (Internal Report - New Product Presentation)

Body

 **SOLVAY**

Account : BAYER CROPSCIENCE, BRUSSELS, Belgium
Date : 2016-03-03
Subject : New Product Presentation
Customer Participant(s) : Thomas O'Malley
Solvay Participant(s) :
Product(s) : (RR) METHYL DUPHOS

Dear All,
Please find below the summary and notes from my visit report:

Objections :

[Send Visit Report Internal](#)

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David doesn't remember who is accountable for the Product he discussed with the Customer... No problem! He is automatically added to the Internal Report as CC!

Visit Report Preview

To:

nicolas.commeaux-ext@solway.com;francoise.coussy-exterieur@solway.com;ricardo-brissos.dias-ex@solway.com;pedro.pinto@solway.com

From:

nicolas.commeaux-ext@solway.com@example.com

CC:

louise.durand@solway.com

AdditionalCC

rachel.singer@solway.com

The **Additional CC** field is automatically populated via rules defined by each GBU. Criteria can be Region, Country and, Corporate Group of the Account, BU or Product level 3. Rules can be configured by Data Stewart.

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David has also the choice of the template language and for the attachments to be included or not.

Select Template: Visit Report in English

Select Attachment	File Name
☐	Product Information.png

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Finally, David verifies the title and content of the email and adapts the text if needed.

Body

Product(s):

Dear All,
Please find below the summary and notes from my visit report:

Objectives :
Executive Summary : this is the summary
Internal Visit Report :

Actions :

- Call assigned to Alexia CARTRY (Due date: 09/12/2016) :
- First call with the customer
- Send quote assigned to Alexia CARTRY (Due date: 09/01/2017) :
- Send a first quote
- Follow up sent quote assigned to Emilien GUICHARD (Due date: 15/01/2017)

Visit Report shared with Customer :

Send report internally

List of past and future actions

Past and future actions are listed at the end of the visit report email body

Activity History								
			Log a Call Mail Merge Send an Email View All			Activity History Help ?		
Action	Subject	Name	Task/Event Record Type	Task	Due Date	Status	Status	Assigned To
Edit Del Call		amanda Adams	Other	✓	09/12/2016	Completed		Alexia CARTRY

Open Activities								
			New Task New Event			Open Activities Help ?		
Action	Subject	Name	Task/Event Record Type	Task	Due Date	Status	Status	Assigned To
☐ Edit Cis Send quote		amanda Adams	Other	✓	09/01/2017	Not Started		Alexia CARTRY
☐ Edit Cis Follow up sent quote		amanda Adams	Other	✓	15/01/2017	Not Started		Emilien GUICHARD

Account : TEST NOVECARE, CITY, Argentina
 Date : 2016-01-08
 Subject : Winter Release
 Customer Participant(s) : Benjamin VEYRIER TEST
Solvay Participant(s) : Leila RADJAH
 Product(s) :

Dear All,
Please find below the summary and notes from my visit report:

Objectives :
 Executive Summary : For memo winter release
 Internal Visit Report :
Unmet Needs: Need a yellow color on Adhesives application
 Actions :

Now, past and future actions are listed at the end of the visit report email body

A new field, **Unmet Needs** was added to enter keywords and description of Customer Unmet Needs.

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Once the visit report is ok for him, he clicks on **Send Report Internally**

SOLVAY

Account: CHEMALIST, LYON, FRANCE
 Date : 2017-04-07
 Subject : 1st visit
 Customer Participant(s) : richard delano
 Solvay Participant(s) : Charles Lachalze , Julien Gasqueton
 Product(s) :

Dear All,
 Please find below the summary and notes from my visit report:

Objectives : Objectives Of The Visit

[Send report Internally](#)

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Related articles

- [Activity: Create a customer visit in Salesforce and from Google Calendar \(Lightning For Gmail\)](#)
- [Visit Report Creation & Update](#)
- [Visit Report Emailing to customer](#)
- [Visit Report: Confidentiality management & Visit report wizard](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>

SOLVAY [FAQ](#) [Demo video](#) [Contact us](#) [EN](#) [FR](#)

SOLVIA We're here to help

Your subject

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)

[Attach documents](#) [Priority: Low](#) [SUBMIT](#)

you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example